T.R.I.M.

Tree Resource Improvement and Maintenance ■ Cost-share Program

The Tree Resource Improvement and Maintenance (TRIM) Program is a competitive cost-share program provided and administered by the Missouri Department of Conservation in cooperation with the Missouri Community Forestry Council and the U.S. Forest Service. The purpose of the program is to provide financial assistance for the management, improvement or conservation of our community forests.

Program Goals

1. To assist Missouri communities in initiating or significantly improving their efforts to care for the community forest
2. To encourage communities to have a sustainable, balanced and comprehensive community forestry program. A sustainable, balanced and comprehensive community forestry program ideally should be based on a current tree inventory and managed with the guidance of a community forestry professional
3. To promote community forestry benefits through the proper management and care of trees in Missouri communities

Eligible Applicants

- All units of government
- Public schools
- Non-profit groups with appropriate permission documented. Such organization must be a 501(c)(3) with a federal identification number.

NOTE: *All projects must be located on publicly owned Missouri property.*

Eligible Activities

Activities are listed in order of priority.

- Municipal tree ordinance development by a forestry consultant
- Development and adoption of a written community tree management plan or community readiness plan for addressing exotic insect or disease outbreaks
- Community tree inventories (hazardous tree survey and maintenance needs survey). The format for all inventory projects must be compatible with i-Tree Streets (for more information, go to itreetools.org).
- Management of ash (*Fraxinus sp.*) trees based on an existing community tree inventory.

Emerald ash borer, *Agrilus planipennis* Fairmaire, is an exotic beetle found in many states including Missouri. Since its discovery, emerald ash borer has:

- ▶ Killed more than millions of ash trees
- ▶ Caused regulatory agencies to enforce quarantines and fines to prevent movement of pest out of area
- ▶ Cost municipalities, property owners, nursery operators and forest products industries tens of millions of dollars.

For more information go to www.emeraldashborer.info

Eligible Activities continued

- Training of city employees and volunteers to improve community forestry practices
- Purchase of tree care education materials, such as books, videos and computer software
- Initial costs of certification for in-house employees by the International Society of Arboriculture
- Development and/or distribution of tree care-related educational materials, such as pamphlets, brochures, videos, PSAs or door hangers (not produced for resale)
- Removal of hazardous trees
- Pruning according to ANSI A300 specifications—no topping

  See American National Standards Institute *A300 Standard Practices for Woody Plant Maintenance* (ANSI A300). Copies available from: International Society of Arboriculture, P.O. Box 3129, Champaign, IL 61826, phone 217-355-9411, www.isa-arbor.com
- Tree planting projects as part of a comprehensive tree management program. Planting of ash (*Fraxinus sp.*) is ineligible for funding.
- The Missouri Forest Action Plan sets the direction for tree management in Missouri by MDC. Other items not specifically listed here but meet Issue Theme Eight needs in the Plan are desired. See the plan at mdc.mo.gov/node/15618

Deadlines

May 14—Applicants must have consulted with a local Department of Conservation forester.

June 1—Applications, complete with a Department of Conservation forester's signature, must be postmarked on or before **June 1** and sent to:

Community Forestry Coordinator
Forestry Division
Missouri Department of Conservation
P.O. Box 180
Jefferson City, MO 65102-0180

Mid-September—Applicants will be notified of approval status.

May 1 of the following year—Approved applicants must have projects completed.

Program Guidelines

- *All trees and all projects must be located on publicly owned Missouri property.* Nonprofit organizations may apply, but all work must be on publicly owned property accompanied by a letter of permission from the affected municipality.
- **NEW THIS YEAR!** Dependent on budget approval, one to three $25,000 maximum grants will be authorized. These grants can focus on data collection or management-plan creation only. All other grant funds will have a $10,000 maximum and a $1,000 minimum.
- Maximum Department of Conservation funding per project is $10,000, with a minimum of $1,000.

- All entries will compete for available funds using established criteria.
- Successful applicants will be reimbursed for the appropriate share amount after the project is completed and all vendors are paid.
- All applicants must consult with a local Missouri Department of Conservation forester and obtain his or her signature on the enclosed **Cost-share Request Form** before applying for funding. Please contact your local Forestry Division office to set up an appointment for consultation (see listing of regional offices enclosed).
- Tree planting projects must conform to the "How to Plant a Tree" (see enclosed).
- All projects will be subject to follow-up inspections to assess their long-term effectiveness. Future funding may be denied if projects are poorly managed.
- Planted trees must be between 1 and 3 inches in stem diameter for deciduous trees (about 6 to 16 feet tall), and between 4 to 16 feet in height for evergreen trees. Shrubs and other plants are not eligible for cost-share assistance but may be part of the total project.
- Planted trees must be guaranteed for one year after planting. Such guarantee must be provided by the nursery or contractor and clearly indicated on their estimates.
- All hazardous trees must be identified by a certified arborist, forester or similarly qualified person using ISA standards.
- Limit letters of support to those involved directly with implementing the project.
- Faxed or emailed submissions are not accepted.

Matching Funds Guidelines

- Funds are awarded on a matching basis. All projects are eligible for a 60 percent match. Projects located in communities that currently have Tree City USA designation are eligible for an additional 15 percent bonus match. Projects submitted by a winner of a Missouri Arbor Award of Excellence are eligible for a one-time additional 5 percent bonus match.
- Funds may not be used to purchase equipment; however, equipment purchase costs may be used as an applicant's share of the total cost of a project.
- Applicants may match cost-share funds with cash, donations, in-kind contributions and administrative costs directly related to the approved project.
- Any costs incurred prior to the formal approval of the project are ineligible for matching purposes or reimbursement, except for tree planting plan preparation fees.
- All project costs approved for funding must be documented, whether the costs apply to the Department of Conservation's portion or to the applicant's match.
- Maintenance of newly planted trees will not be cost-shared.

Payment Process

Applicants will be reimbursed for the appropriate share amount after the project is completed. After completion, applicants must notify their local Department of Conservation Forestry Division contact in writing and provide copies of **paid** receipts and itemized documentation of in-kind matches and donations. Inspection of the completed project and approval will be made by the local Forestry Division regional supervisor or a representative.

Judging Criteria

The application process is competitive. A panel of Department of Conservation Forestry Division employees and members of the Missouri Community Forestry Council will judge all proposals.

Applicants will be evaluated by the following criteria:

- Inclusion of all required information (see Application Procedure, page 4)
- Proposals demonstrating that the project is a component of a total tree management program.
- Project's capacity for promoting, improving and developing a community's urban forest resource
- Technical merit
- Relative value to the site and community
- Educational value and opportunities
- Percentage of community or census block with household income below poverty level (2000 U.S. Census Data) or percent of students enrolled in free or reduced lunch program
- Thoroughness and completeness of management plan or planting and three-year maintenance plan
- Reasonable estimates for all expenditures
- Plan for publicizing project.
- Applicants funded in the previous five years will be given lower priority but may still be funded.

Not all criteria will apply to all projects. Conservation Department funds will be awarded based upon the number of applications and available funds. Requested funds may be reduced if cost estimates are judged to be excessive.

Application Procedure

Applications must include all eight of the following elements. Incomplete applications will not be evaluated. **Two copies of the eight required elements must be submitted.**

1. Estimated Project Cost Worksheet and Cost-share Request Form

2. Concise Narrative (maximum 1,800 words)
A concise narrative clearly states the purpose and objectives of the project and explains how the project impacts long-range community forestry goals. Projects that address one or more "Program Goals" are desirable. Be sure that your description addresses the judging criteria and includes detail on the following:

- End product or result
- How this project fits into your present tree management program
- Participants and their roles (such as employees, contractors, volunteers and business or civic sponsors)
- Facilities and equipment needed to accomplish project
- Name and address of individual charged with administering the project

3. Maps

- All applications must include a location map that shows how the project site relates to the surrounding area and the community as a whole.
- Planting projects must also include an accurate plan-view drawing to scale with a north arrow of the proposed project. Plans must include buildings, above- and below-ground utilities, streets, walks and existing trees on and adjacent to project site as well as proposed trees to be planted.
- Maintenance projects, such as a street tree inventory, hazard tree removals and pruning activities, must also include a city map showing the location of proposed work and street address.

The TRIM Workbook to help you complete the application is online at mdc.mo.gov/node/11123
For a copy, write or call:
Community Forestry Coordinator
Missouri Department of Conservation
PO Box 180
Jefferson City, MO 65102-0180
573-522-4115, ext. 3306

4. Itemized Budget

- An itemized budget, including all expenses and sources of funds, should clearly identify activities and their associated costs. For example, include the purchase and installation of trees according to specifications, a complete list of the trees to be planted (including tree size and species) and numbers of trees to be pruned or removed. All costs must be documented. Describe all in-kind matches (such as administration and materials) and donations.
- Provide an estimate on commercial bid form or letterhead of all contracted costs. Tree-planting projects must include a nursery estimate listing all trees to be planted and guaranteeing one year's survival on all trees.
- If employees will complete work, please estimate these labor costs separately. If volunteer labor will be used, please estimate volunteer time at the rate of $10 per hour per person.

5. Three-year Maintenance Plan

Tree planting and invasive species eradication projects must include a written three-year tree-maintenance plan that details procedures and identifies caretaker(s). *Costs for these activities are not eligible for cost share.*

- Minimum maintenance for tree planting includes watering, monitoring for insect and disease problems, and re-mulching for three years after planting.
- Minimum maintenance for invasive species eradication includes frequent routine monitoring and aggressive removal of all sprouts for three years after the initial eradication efforts.

6. Permission Letter

A letter of permission from the affected municipality must be included if the proposed project is located on land not owned by the applicant.

7. Publicity Plan

All applications must outline how the work completed will be shared with citizens in the community. Be sure to address how the Conservation Department's contribution will be acknowledged.

8. Two copies of entire package are required.

Revised March 2012

T.R.I.M. Estimated Project Cost Worksheet

Applicant _____ Contact person _____

Address _____

Phone _____County _____

City/State _____ ZIP (9-digit ZIP required) _____

Project location _____

Project Type *(check all that apply)*:

☐ Inventory ☐ Removal ☐ Pruning ☐ Education ☐ Planting ☐ Other

Provide costs only for items associated with your project.

A. Reimbursable Costs

Amount

1. Contract fee *(tree management plan, material development, inventory)* _____
2. Contracted labor *(tree removals, pruning, planting, inventory)* _____
3. Purchased materials for inventory or tree work _____
4. Equipment rental *(inventory, planting or other tree work)* _____
5. Education *(training course fees, program materials)* _____
6. Tree planting plan preparation fee _____
7. Trees for planting and delivery, less any discount _____
8. Purchased materials for planting *(stakes, mulch)* _____

SUBTOTAL **$**_____

B. Non-reimbursable Costs

1. Administrative costs *(tree care, education, inventory)* _____
2. Paid employee labor *(tree care, education, inventory)* _____
3. Donated labor *(tree work, planting or inventory (at $10/hr))* _____
4. Donated equipment costs _____
5. In-kind equipment _____
6. Donated materials *(stakes, mulch, etc.)* _____
7. Discount or credit for trees or tree planting _____
8. Other _____

SUBTOTAL **$**_____

C. Total Estimated Project Costs

(Add above and round to nearest dollar.)

$_____

Transfer total to back side of form

Please complete Cost-share Request Form on reverse side.

T.R.I.M. Cost-share Request Form

Applicant _____ Contact person _____

Project location _____

C. Total Estimated Project Costs

$_____
Amount from front side of form

D. MDC Cost-share Computation

Missouri Department of Conservation's Cost Share $_____
(60% X Total estimated project cost)

Tree City USA Bonus $_____
(15% X Total estimated project cost)
NOTE: *To qualify for bonus, project must be located in a community that is currently certified as a Tree City USA.*

Missouri Arbor Award of Excellence Bonus $_____
(5% X Total estimated project cost)
NOTE: *To qualify for bonus, applicant must be the winner of an MAAE award.*

SUBTOTAL
Add all amounts in D (above): $_____

SUBTOTAL REIMBURSABLE COSTS
Enter the SUBTOTAL from A on front side: $_____

TOTAL MDC COST SHARE $_____
Enter the smaller of the above two lines. Total MDC Cost Share cannot exceed Reimbursable Costs. Maximum available is $10,000 unless specifically authorized.

E. Local Cost-share Computation

Total MDC Cost Share subtracted from Total Estimated Project Costs $_____

I certify that funds received through the Tree Resource Improvement and Maintenance program will be used only for the care of trees or planting of trees on public property, as noted in this application. I certify that all trees subject to this contract will be pruned in accordance with American National Standard Institute *A300 Standard Practices for Wood Plant Maintenance* specifications and that trees will be planted in accordance with the enclosed "How to Plant a Tree."

_____
Name and Title of Representative

_____
Signature of Representative Date

_____
Signature of Missouri Department of Conservation Forester Date

Revised March 2012

How to Plant a Tree

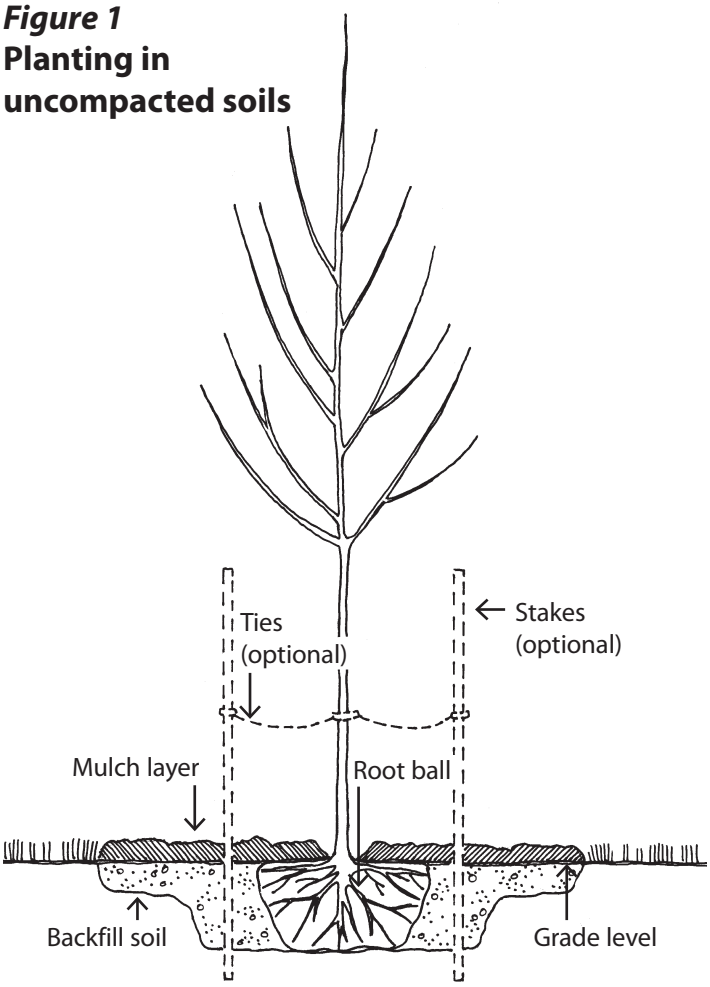
Selecting trees

Consider the limitations of the planting site, the purpose for the tree, and each tree's unique growing requirements before selecting the type of tree to be purchased. Before purchasing, check to be sure that the new tree does not have a great deal of soil added over the root flare. The root flare is the point where the top major roots extend out from the tree trunk. Unfortunately, many new trees have the root flare buried under several inches of soil. This is to be avoided at all times.

Determine the proper planting depth

Trees should be planted with their top major roots even with the soil line (see Figure 1). Trees planted at the wrong depth do not develop well and may have shortened life spans. Excess soil should be removed before planting.

Figure 1
Planting in uncompacted soils



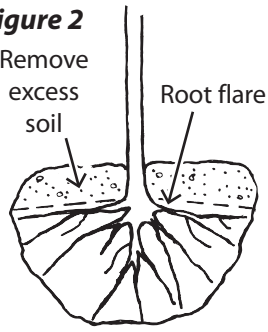
For balled-and-burlap trees, gently poke a stiff wire through the burlap next to the tree trunk until you hit a root. Note the distance between the top of the root ball to the first root. Check in two or more locations around the trunk to make sure you've located the top major roots. Leave the burlap in place to do this to make moving the tree easier. The distance from the top-most root to the bottom of the ball is the correct depth to dig your hole. Carefully remove the excess soil from the top of the root ball once it is in the planting hole. Container trees should have the soil carefully removed from the top, exposing the root flare, and then planted.

The planting hole

Dig a spot at least twice the diameter of the root ball and deep enough to place the root flare even with (or up to 1 inch higher than) the soil line. Place the tree in the hole, taking care to handle it by the root ball—not by the trunk. In order to prevent settling after planting, make sure the root ball or container soil rests on solid ground—not fill dirt.

Carefully cut the twine wrapped around the stem at the top of the root ball.

Figure 2



Be sure to remove the following:

1. All tags, labels and strings
2. The wire basket from around the root ball
3. Any container holding the root system
4. Burlap from at least the top half of the root ball to prevent wicking of moisture from the soil
5. All excess soil on top of the ball, exposing just the root flare (see Figure 2)

Backfill soil

Make sure the tree is straight before backfilling. Use the same soil that came out of the pit. Finely chop the soil and remove any stones or debris. Avoid potting soil, peat moss or other amendments. Fill the hole halfway, watering thoroughly as you go, then finish backfilling. Work the soil around the ball gently so that no air pockets are left. Firm the soil so the tree is vertical and adequately supported, but do not pack the soil.

Water
Saturate the entire backfilled soil with water. A slow, gentle soaking is best. Add more soil, if needed, to compensate for settling.

Mulch
Cover smoothed soil with 3 inches of wood compost or bark chips. Shape the mulch into a doughnut 2 to 3 feet wide, leaving a small gap near the trunk. Do not mound mulch onto the trunk of the tree. Mounding encourages root girdling, which can weaken and kill trees. Black plastic, grass clippings or sawdust should not be used as mulch. Keep mulch weeded. Replace as needed.

Pruning
Remove only broken or badly deformed branches the first year. Begin a regular pruning program the second or third year after planting.

Optional procedures

Stakes
Stakes may be used to prevent shifting of the root ball or to protect the stem from mowing equipment. If needed, the tree should be guyed strongly enough to provide support, but flexibly enough to allow 6 to 8 inches of sway. Drive one or more stakes near the tree, but not through the roots.

The best guying materials are wide and flexible, such as plastic horticultural tape or canvas webbing.

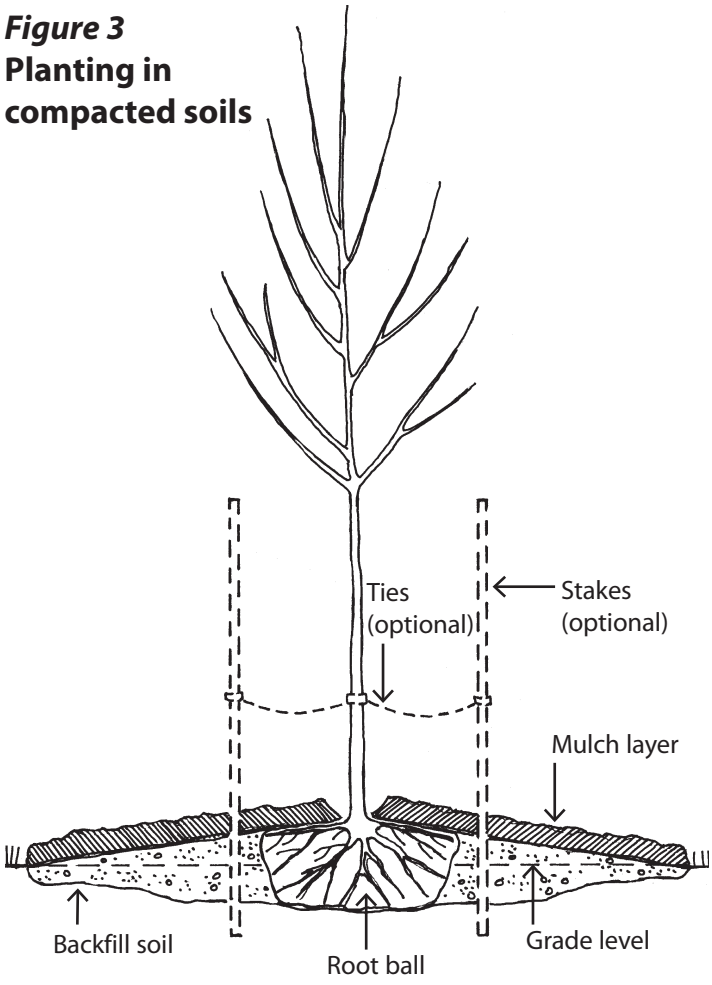
Remove guys/ties as soon as the tree can stand alone—about three months, but no longer than one year after planting. Guys/ties ultimately can kill your tree if not removed.

Trunk wrap
Research indicates that trunk wraps provide little, if any, benefit to trees. In fact, they can encourage damaging insects or disease-causing fungi. Avoid using trunk wraps unless specifically recommended.

Planting in compacted soils
To test for compacted soil, do a simple percolation test. Dig a hole 12 inches to 18 inches deep and fill it with water. If any water is still in the hole 12 to 18 hours later, then you have compacted or heavy clay soils.

Roots need oxygen, so dig a wide, shallow hole three to four times the width of the root ball or container and only half as deep. Mound backfill soil slightly to the top of the root flare, covering the entire excavation. This creates a raised planting bed, which will improve the tree's performance (see Figure 3). Soils that hold excessive moisture may need a subsurface drain tube installed below the root ball, or look for alternative sites.

Figure 3
Planting in compacted soils



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